

**Memorandum**

**TO: CFC Moderate Need Providers**  
**From: Susan Wehry, MD, Commissioner**  
**Date: October 24, 2011**  
**Re: 6-month pilot: Moderate Needs Group applications for Adult Day services**

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In an effort to further streamline enrollment into the Choices for Care Moderate Needs Group, the Department offers the following option for a six month trial period, ending May 1, 2012.

During this period, Adult Day Providers may elect to apply directly to DAIL on behalf of individuals seeking adult day services. At the end of the trial period, we will evaluate the success of this option based on: (1) the number of errors in submission; (2) the length of time between application and enrollment; and (3) the effectiveness of coordination of homemaker services.

The Procedures and Assurances below are consistent with the Department's mission to provide person-centered, accessible choices to individuals seeking support to live as independently as possible in their chosen community. Providers electing to participate in the pilot must sign a copy of the attached assurances and submit to the DAIL Moderate Needs Coordinator, Mary Tebeau, before starting the pilot.

Thank you in advance for considering participation in this pilot.

## PROCEDURES for 6 month pilot

### **Applications**

1. The Adult Day provider assists the applicant in completing the Moderate Needs application.
2. The Adult Day provider completes the Independent Living Assessment (ILA) intake and screens for clinical eligibility using the Moderate Needs Group Clinical Eligibility Worksheet.
3. If the applicant meets the Moderate Needs Groups clinical criteria, the Adult Day provider completes the Moderate Needs Group Financial Eligibility Worksheet.
4. If the applicant expresses an interest in receiving Homemaker Services, the Adult Day provider contacts the Homemaker Service to ascertain the availability of funding.
5. If the applicant meets both the clinical and financial criteria, and there is funding to serve the individual, the Adult Day provider will send the Permission for Release of Information, Moderate Needs application, ILA, clinical worksheet, financial worksheet, and complete package checklist, to the DAIL office (ATTN: Moderate Needs Coordinator, Mary Tebeau) and the chosen Case Management Agency. If the applicant has requested homemaker services and funding is available, the Adult Day provider will also forward this information to the Homemaker agency.

### **Decisions**

The Moderate Needs Coordinator will review the clinical and financial eligibility worksheets for accuracy and eligibility determination.

6. Eligibility Approval: If found clinically and financially eligible for Moderate Needs Group services, the Moderate Needs Coordinator will complete and send the Moderate Needs Group Service Authorization to the applicant, Moderate Needs Providers and The Department for Children and Families.
7. Eligibility Denial: If during the process any Moderate Needs provider believes an applicant is not eligible, they will inform the Moderate Needs Coordinator. The Moderate Needs Coordinator will review and make a final determination. If the applicant is not eligible, the Moderate Needs Coordinator will inform the Adult Day provider and send the applicant a written notice of denial including appeal rights.
8. Waiting list: If the applicant meets the clinical and financial criteria and funding is NOT available, the Adult Day provider will inform the applicant that they have been placed on the waiting list. The applicant will be placed on the waiting list according to Community Medicaid eligibility and chronological order on receipt of completed application package. The Adult Day provider will submit the wait list to the Moderate Needs Coordinator on a monthly basis.
9. Reassessments: Upon acceptance into the Moderate Needs Program, the Case Manager will become responsible for reassessments and the provision of case management services as indicated in the Moderate Needs Manual.

<b>Assurances for 6 month pilot</b>
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As a condition of participating in this pilot, the participating agency's signature below assures that it will:

1. Assist every person who requests adult day services to apply.
2. Inform every applicant of their choice of case management agency.
3. Notify the chosen case management agency by telephone of the applicant's name and request for Moderate Needs Services at the time an application is submitted to DAIL.
4. Give applicants a choice of having their application submitted by either the adult day provider or the case manager.
5. Send a complete copy of the application packet to the chosen case management agency at the same time as submission to DAIL. (note: If the person chooses to have the case manager submit the application, send a completed copy of the application packet only to the case management agency).
6. Ensure that individuals are informed of all Moderate Needs services that may potentially be available to them.
7. Communicate with the case management agencies in the service area of the adult day to send any applications they receive if it is sent to the case management agency as is the standard practice and noted on the application.
8. Ensure that this activity is being taken on willingly and knowingly with no expectation of payment from DAIL.
9. Ensure due diligence in verifying individuals are not eligible for DHRS and that they meet the clinical and financial criteria for Moderate Needs.
10. Agree to participate in a meeting to resolve any discrepancy in client data completed by any of the providers.

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**Agency name**

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**Authorized signature      Date**